



## STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**  
Collections Unit Manager

**Job Code Title**  
Program Manager II

**Pay Band**  
7b

**Job Code Number**  
111917

**Citizen Services and Resource Management Division**  
Collections Bureau  
Collections Unit

**Fair Labor Standards Act**  
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Citizen Services and Resource Management Division (CSRM) administers the accounting, purchasing, safety, security, and statewide facility functions. The division also administers the call center, forms design, one-stop business licensing coordination, receipt and distribution of unclaimed property, and collections and bankruptcy functions. The Citizen Services and Resource Management Division includes the Financial and Asset Management Bureau, the Citizen Services Bureau, and the Collections Bureau. The Collections Bureau is responsible for the daily management of accounts receivable and collections. Services include establishing taxpayer payment plans, legal collection activity, phone collections, management of the state's bad debt program, and bankruptcy functions. The bureau includes the Collections Unit and the Bankruptcy Unit.

### **Job Responsibilities**

The Collections Unit Manager leads and supervises staff responsible for phone and legal collection of taxes owed and is responsible for managing the day-to-day activities of the unit. The incumbent assists the bureau chief to determine short and long-range goals and objectives associated with bureau activities. The incumbent provides guidance, technical assistance, and training; interprets state and federal laws, statutes, rules and regulations for assigned staff, other agencies, and the public; and is responsible for management, leadership, and direct supervision of unit staff. The position reports to the Collections Bureau Chief.

- **Staff Leadership, Management, and Supervision 40%**

The incumbent is responsible for leading staff and managing the day-to-day activities of the unit. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

#### **Staff Leadership**

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with

staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.

2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the unit. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the unit's mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

#### Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; unit needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, unit performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the unit follows department expectations regarding disclosure and employee confidentiality.

#### Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.

3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adheres to rules, policies, procedures, and collective bargaining agreements.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Unit Administration 30%**

Assists the bureau chief in the development of short and long-range goals and objectives associated with day-to-day activities of the unit. Develops and implements unit strategies, processes, policies, and objectives to ensure the ongoing effectiveness of services, activities, and achievement of overall bureau and division goals.

1. Conducts unit planning in coordination with the other unit managers and the bureau chief to ensure day-to-day process plans incorporate bureau and division goals and objectives. Ensures that planned activities comply with department, state, and federal standards.
2. Evaluates new legislation, policies, and rules. Identifies potential impacts. Prepares fiscal notes as requested. Recommends implementation methods, procedures, and time frames. Analyzes business rules and practices for operations that may impact internal agency and external agency and public stakeholders.
3. Reviews state and federal laws, rules, and regulations; public needs; needs of outside agencies; and applicable legislation. The unit manager must evaluate division procedures to identify and recommend new approaches to training, information technology, processing, and related activities that incorporate division goals and policies.
4. Reviews division policies and recommends new or revised policies to ensure consistent and legally defensible compliance with all applicable laws, rules and regulations as well as effective division operations. Consults with appropriate staff and managers; identifies or develops new policies; and recommends new policies to the bureau chief.
5. Directs the research, planning, design, testing, and implementation of new operations. Develops and coordinates proposals including costing and staffing options. Identifies project limitations, capabilities, and performance requirements.
6. Participates or leads special project teams as liaison and representative of the unit, bureau, or division. Provides valuable input to ensure overall project success. Coordinates meetings with appropriate staff representation. Ensures project plans are clearly identified, tracked, and reported.
7. Effectively represents the unit, bureau, division and the agency, as applicable, at meetings, conferences, hearings, committees, and other proceedings and events.
8. Serves as a member of applicable management teams. Appropriately participating in team decision-making and associated activities.

9. Keeps abreast of legislative, regulatory, management directive, organizational, or other changes or initiatives that may affect assigned area, analyzes impact, and recommends or takes necessary action to address them.
10. Ensures efficient workflow of unit tasks. Coordinates workflow and tasks with other unit managers. Identifies process flow bottlenecks and recommends solutions. Manages peak season workloads.
11. Assesses the impact of changes in technology, state and federal requirements, and bureau operations. Determines methods to increase efficiency and ensure continued compliance.
12. Produces, proofs, and distributes reports. Maintains and provides detailed unit reports as required for division/department management and legislative auditors.
13. Oversees and coordinates projects internal and external to the department. Works in an evolutionary and progressive computing environment. Ensures services are compliant and updated as necessary. Analyses project results to identify possible improvement to services.
14. Develops various reports, spreadsheets and other tracking methods to monitor unit status, work progress, and performance. Identifies information needs. Determines and implements effective tracking and reporting systems. Monitors collected data to identify areas of concern. Provides analysis to management and others to resolve problems, make legislative presentations, and identify areas of strength and weakness.
15. Recommends unit budget for staffing and equipment by reviewing allocations, recommendations from subordinates, unit plans and objectives, and expenditures. Monitors expenditures to ensure the money is spent as designated and tracks funding levels through review of accounting reports and approval of expenditures. Reviews and approves all requisitions, payrolls, expense claims, vendor claims, etc. for the unit to ensure budgets are not exceeded and that department resources are used in the most efficient manner possible.

- **Other Administrative and Legal Functions 25%**

1. Provides assistance and advice to department attorneys during appeal proceedings. Provides information and documentation. Assists in examination and analysis of documents. Recommends appropriate resolutions. Testifies in hearings as required.
2. Works with Legal Services in representing the department in administrative and district court hearings by providing background information and documentation; assisting in examination and analysis of documents; and recommending enforcement strategies.
3. Works directly with internal customers to ensure processing objectives meet expectations of other business units in conjunction with department goals and objectives.
4. Works directly with external customers to ensure exemplary service that meets department goals and objectives as well as the customer's expectation.
5. Communicates by phone; in writing utilizing department written communication guidelines; and in face-to-face meetings. Presents themselves in a professional and respectful manner.

- **Other Duties 5%**

1. Performs a variety of other duties as assigned.
2. Directs special projects.
3. Attends ongoing education and training.

### **Job Requirements**

To perform successfully as a unit manager, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team; make sound decisions and be accountable for them; generate innovative ideas; and have personal

initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires advanced knowledge of governmental accounting; the principles and practices of revenue program administration; financial and data processing systems; applicable state and federal regulations, statutes, and policies; public information and education, and presentation methods and techniques. Knowledge of general management practices including strategic planning; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; governmental organizational structure, accounting, and budgeting; and legislative and administrative rule processes and guidelines is required. The work also requires knowledge of computers and database management including state and department information systems (GenTax, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in public administration, business administration, accounting, or closely related field and four years of job-related experience including two years of supervision and/or management.
  - Work experience should include three years of related tax experience including using tax and/or data management systems.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the unit. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful

work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. May involve travel, some which will be out-of-state, therefore, a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: January 2013

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: January 2013

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_